

Form 990-EZ

# Short Form

## Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

► Do not enter social security numbers on this form as it may be made public.

► Go to [www.irs.gov/Form990EZ](http://www.irs.gov/Form990EZ) for instructions and the latest information.Department of the Treasury  
Internal Revenue Service

A For the 2018 calendar year, or tax year beginning July 1, 2018, and ending June 30, 2019

B Check if applicable	C Name of organization <b>Kappa Delta Sorority, Delta Zeta Chapter</b>		D Employer identification number 726034680
<input type="checkbox"/> Address change	Number and street (or P O box, if mail is not delivered to street address) 3405 West Deborah Dr		E Telephone number 318-572-6023
<input type="checkbox"/> Name change	Room/suite 07		F Group Exemption Number ►
<input type="checkbox"/> Initial return	City or town, state or province, country, and ZIP or foreign postal code Monroe, LA 71201		
<input type="checkbox"/> Final return/terminated			
<input type="checkbox"/> Amended return			
<input type="checkbox"/> Application pending			

G Accounting Method.  Cash  Accrual Other (specify) ►I Website: ► <http://ulm.kappadelta.org/>J Tax-exempt status (check only one) —  501(c)(3)  501(c)(7) (insert no)  4947(a)(1) or  527K Form of organization  Corporation  Trust  Association  Other

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B)) are \$500,000 or more, file Form 990 instead of Form 990-EZ ► \$

**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (see the instructions for Part I)Check if the organization used Schedule O to respond to any question in this Part I 

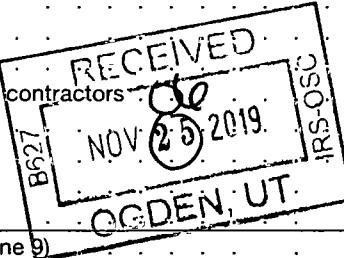
Revenue	1 Contributions, gifts, grants, and similar amounts received	1	280
	2 Program service revenue including government fees and contracts	2	
	3 Membership dues and assessments	3	92,101
	4 Investment income	4	1,370
	5a Gross amount from sale of assets other than inventory	5a	
	b Less: cost or other basis and sales expenses	5b	
	c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	
	6 Gaming and fundraising events		
	a Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	b Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b	
	c Less: direct expenses from gaming and fundraising events	6c	
	d Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d	
	7a Gross sales of inventory, less returns and allowances	7a	
	b Less: cost of goods sold	7b	
	c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
	8 Other revenue (describe in Schedule O)	8	34,123
	9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	127,874
Expenses	10 Grants and similar amounts paid (list in Schedule O)	10	
	11 Benefits paid to or for members	11	
	12 Salaries, other compensation, and employee benefits	12	
	13 Professional fees and other payments to independent contractors	13	763
	14 Occupancy, rent, utilities, and maintenance	14	1,515
	15 Printing, publications, postage, and shipping	15	2,099
	16 Other expenses (describe in Schedule O)	16	119,395
17 Total expenses. Add lines 10 through 16	17	123,772	
Net Assets	18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18	4,102
	19 Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	180,333
	20 Other changes in net assets or fund balances (explain in Schedule O)	20	
	21 Net assets or fund balances at end of year. Combine lines 18 through 20	21	184,435

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No 10642I

Form 990-EZ (2018)

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**Part II Balance Sheets** (see the instructions for Part II)Check if the organization used Schedule O to respond to any question in this Part II 

		(A) Beginning of year	(B) End of year
22	Cash, savings, and investments	180,333	22
23	Land and buildings		23
24	Other assets (describe in Schedule O)	2,366	24
25	<b>Total assets</b>	182,699	25
26	Total liabilities (describe in Schedule O)	-2,366	26
27	<b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	180,333	27
			184,435

**Part III Statement of Program Service Accomplishments** (see the instructions for Part III)Check if the organization used Schedule O to respond to any question in this Part III 

What is the organization's primary exempt purpose? \_\_\_\_\_

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

**Expenses**

(Required for section 501(c)(3) and 501(c)(4) organizations, optional for others)

28	.....		
	(Grants \$ ) If this amount includes foreign grants, check here ► <input type="checkbox"/>	28a	
29	.....		
	(Grants \$ ) If this amount includes foreign grants, check here ► <input type="checkbox"/>	29a	
30	.....		
	(Grants \$ ) If this amount includes foreign grants, check here ► <input type="checkbox"/>	30a	
31	Other program services (describe in Schedule O) .....		
	(Grants \$ ) If this amount includes foreign grants, check here ► <input type="checkbox"/>	31a	
32	<b>Total program service expenses</b> (add lines 28a through 31a) .....	► <input type="checkbox"/>	32

**Part IV List of Officers, Directors, Trustees, and Key Employees** (list each one even if not compensated—see the instructions for Part IV)Check if the organization used Schedule O to respond to any question in this Part IV 

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
Joanna Franklin		0	0	0
President		0	0	0
Ainsley Salazar		0	0	0
VP of Finance		0	0	0
Olivia Bailey		0	0	0
VP New Member Ed		0	0	0
Lauren Palowsky		0	0	0
VP Membership		0	0	0
Hannah Giddens		0	0	0
VP Operations		0	0	0
Michiala Hemphill		0	0	0
VP Community Service		0	0	0
Kaitlyn Keller		0	0	0
VP Public Relations		0	0	0
Makayla Kraemer		0	0	0
VP Standards		0	0	0
Maegan Callais		0	0	0
Secretary		0	0	0
Kelsey Laudenheimer		763	0	0
Financial Advisor & Tax Preparer				
Carol Anne Barnes		0	0	0
Chapter Council Advisor		0	0	0
Lisa Miller		0	0	0
University Advisor		0	0	0

**Part V Other Information** (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V

33 Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O

	Yes	No
33	✓	

34 Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O. See instructions

34	✓
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35a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?

35a	✓
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b If "Yes" to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O

35b	✓
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c Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III

35c	✓
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36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N

36	✓
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37a Enter amount of political expenditures, direct or indirect, as described in the instructions ► **37a** 0

37a	0
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b Did the organization file Form 1120-POL for this year?

37b	✓
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38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?

38a	✓
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b If "Yes," complete Schedule L, Part II and enter the total amount involved

38b	
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39 Section 501(c)(7) organizations. Enter:

39a	0
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a Initiation fees and capital contributions included on line 9

39b	0
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40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under section 4911 ► \_\_\_\_\_ ; section 4912 ► \_\_\_\_\_ , section 4955 ► \_\_\_\_\_

40a	
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b Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I

40b	✓
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c Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958

40c	
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d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization

40d	
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e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T

40e	✓
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41 List the states with which a copy of this return is filed ► N/A - Federal Filing Only

42a The organization's books are in care of ► Ainsley Salazar, Chapter Treasurer Telephone no. ► 318-789-1296

Located at ► 104 Kings Dr, West Monroe, LA ZIP + 4 ► 71291

b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? If "Yes," enter the name of the foreign country ►

42b	✓
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See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).

42c	✓
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c At any time during the calendar year, did the organization maintain an office outside the United States? If "Yes," enter the name of the foreign country ►

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041—Check here □ and enter the amount of tax-exempt interest received or accrued during the tax year ► **43** □

43	□
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44a Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ

44a	✓
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b Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ

44b	✓
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c Did the organization receive any payments for indoor tanning services during the year?

44c	✓
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d If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O

44d	
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45a Did the organization have a controlled entity within the meaning of section 512(b)(13)?

45a	✓
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b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ. See instructions

45b	✓
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46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I. Yes  No  46 ✓

**Part VI      Section 501(c)(3) Organizations Only**

All section 501(c)(3) organizations must answer questions 47–49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI

		Yes	No
47	Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	47	
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48	
49a	Did the organization make any transfers to an exempt non-charitable related organization?	49a	
b	If "Yes," was the related organization a section 527 organization?	49b	
50	Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."		

f Total number of other employees paid over \$100,000 . . . . ►

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000

52 Did the organization complete Schedule A? Note: All section 501(c)(3) organizations must attach a completed Schedule A  Yes  No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here  Signature of officer Date  11/16/19  
Type or print name and title

<b>Paid Preparer Use Only</b>	Print/Type preparer's name Kelsey Laudenheimer, CPA	Preparer's signature 	Date 11/05/19	Check <input checked="" type="checkbox"/> if self-employed	PTIN P02010206
	Firm's name ► Kelsey Laudenheimer, CPA	Firm's EIN ►			
	Firm's address ► 3405 W Deborah Dr., Monroe, LA 71201	Phone no. 318-572-6023			

May the IRS discuss this return with the preparer shown above? See instructions

▶  Yes  No

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

- Attach to Form 990 or 990-EZ.
- Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2018**

Open to Public  
Inspection

Name of the organization

Kappa Delta Sorority - Delta Zeta Chapter

Employer identification number

72-6034680

**Part I**

Line 8 - \$34,123 in Other Revenue represents the funds raised through the organizations annual fundraiser for Prevent Child Abuse America

Line 16 - \$119,395 in Other Expenses consist of the following accounts

Bad Debt Expense	\$115
Billing System/ Software Fees	\$4,542
Charitable Contributions	\$21,858
Education & Travel Expenses	\$2,456
Fundraising Expenses	\$15,111
Head Quarters Fees (charged by Organization's National HQ)	\$1,025
Insurance Expenses	\$60
Meals/ General Food Expense	\$4,202
Member Discounts (for early payment)	\$18
Panhellenic Fees	\$1,200
Photography Expenses	\$7,784
Recruitment Expenses	\$4,190
Social/ Entertainment Expenses	\$36,617
T-Shirts, Gifts & Other Flow Through Items	\$20,217
<b>TOTAL OTHER EXPENSES</b>	<b>\$119,395</b>

Name of the organization

Kappa Delta Sorority - Delta Zeta Chapter

Employer identification number

72-6034680

## Part II

Line 24 - \$1,0099 is made up of \$520 in outstanding Accounts Receivable and \$489 of Prepads at the end of the fiscal year

Line 25 - Of the \$184,969 in total assets, \$122,529 is in a restricted savings account at National Headquarters. The purpose of this savings account is to one day fund the construction of a living/meeting facility for the organization's members. The operating and savings account are accounted for separately but consolidated for tax return purposes (as they are both owned by the chapter)

Line 26 - \$534 represents total liabilities owed at the end of the fiscal year. Broken down as follows

\$14 - Accounts Payable

\$520 - Deferred Revenue

**\$534 - TOTAL**